

ARIZONA WORKFORCE

FORECAST
REPORT

Arizona Department of Commerce, Research Administration

May 1, 2008

State Expects Growth to Return in 2009 After Slight Loss of Jobs in '08

For the forecast period of 2008 to 2009, the Arizona Department of Commerce projects slightly negative state employment growth in 2008 and slightly positive growth for 2009.

Since 1990, previous periods of low or negative growth in Arizona have lasted for no more than two to three years (see chart below). In this business cycle, 2007 showed the beginning of slow growth with 1.2 percent, reflecting the decline in construction employment. Expectations are that

Arizona will see improvements by the last part of 2008, with a return to positive growth by the last half of 2009.

As one of the fastest growing states in recent years, Arizona was disproportionately affected by the housing bubble, boom and bust. The effects of problems caused by the recent housing downturn, increased energy costs and tightened access to credit have spread throughout Arizona's economy.

Total Nonfarm Employment Annual Average Growth Rate

| | 2007 ^(a) | 2008 ^(b) | 2009 ^(b) |
|-------------------------------|---------------------|---------------------|---------------------|
| Arizona | 1.2% | -0.5% | 0.1% |
| Phoenix-Mesa- | | | |
| Scottsdale MSA ¹ | 1.3% | -0.5% | 0.1% |
| Tucson MSA ² | 0.9% | -1.5% | -0.3% |
| Balance of State ³ | 1.0% | 0.7% | 0.5% |

1) Maricopa and Pinal counties

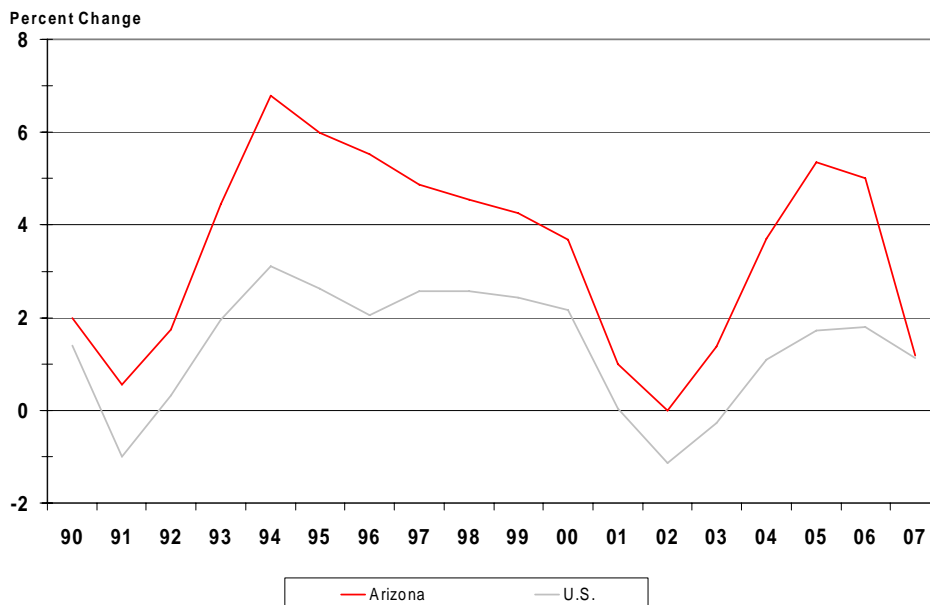
2) Pima County

3) Arizona less Maricopa, Pinal and Pima counties

a) Historical

b) Forecast

Annual Percentage Change in Arizona and U.S. Nonfarm Employment, 1990-2007



Source: Arizona Department of Commerce, Research Administration, and U.S. Dept. of Labor, Bureau of Labor Statistics

However, Arizona is in a better position to return to growth than in previous downturns with low interest rates for mortgages, and housing beginning a return to more realistic pricing patterns. The current federal economic stimulus is expected to provide a small boost in consumer spending, starting this week, and in personal debt reduction, producing the potential for increasing consumer confidence and spending.

Arizona industries with the greatest expected percentage growth through 2009 are natural resources and mining (25 percent), education and health services (5.7 percent) and leisure and hospitality (1.8 percent).

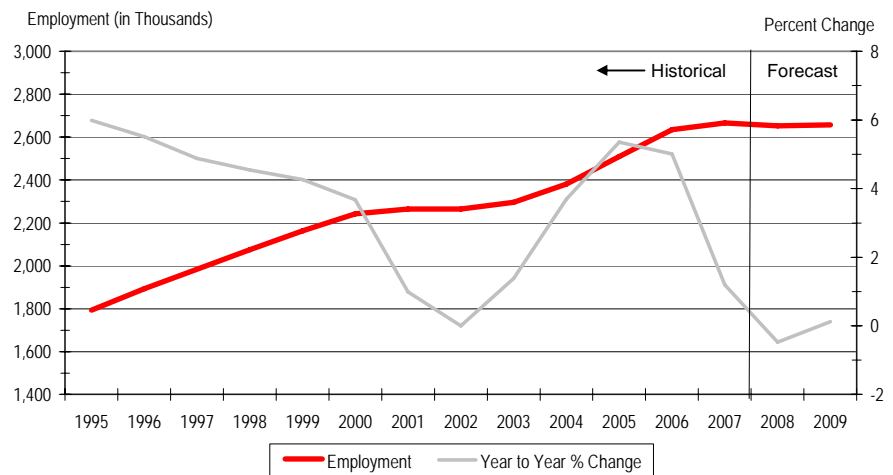
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The natural resources and mining industry is forecast to grow 16.6 percent in 2008 and 8.4 percent in 2009, adding almost 3,000 jobs during the forecast period.

Education and health services will add the most jobs in 2008 and 2009, totaling almost 17,800 over the forecast period. Arizonans' demand and need for health services provide continued growth in this industry. Growth is tempered by forecast reductions in spending on private educational services.

Growth in the leisure and hospitality sector is forecast for slightly less than 2 percent total, and almost 5,000 jobs will be added. Foreign visitors find Arizona a good vacation destination and value, and gasoline

Arizona Nonfarm Employment and Annual Percentage Change, 1995-2007 (Historical) and 2008-2009 (Forecast)



Source: Historical Data - Arizona Dept. of Commerce, Research Administration, in cooperation with U.S. Dept. of Labor, Bureau of Labor Statistics;
Forecast Data - Arizona Dept. of Commerce, Research Administration, May 2008

Arizona Industry Employment

Average Annual Percent Change

| | 2007 ^(a) | 2008 ^(b) | 2009 ^(b) |
|----------------------|---------------------|---------------------|---------------------|
| Manufacturing | -2.2% | -2.1% | -0.9% |
| Natural Resources/ | | | |
| Mining | 14.1% | 16.6% | 8.4% |
| Construction | -6.6% | -10.5% | -2.7% |
| Trade, Trans. & | | | |
| Utilities | 2.4% | 0.5% | 0.3% |
| Information | -3.2% | 0.5% | 0.0% |
| Financial Activities | 0.4% | -2.9% | -1.2% |
| Profess & Business | | | |
| Services | 1.9% | -0.4% | -0.1% |
| Education & | | | |
| Health Services | 4.1% | 3.8% | 1.9% |
| Leisure & | | | |
| Hospitality | 2.2% | 1.1% | 0.7% |
| Other Services | -1.2% | -1.5% | -0.4% |
| Government | 3.5% | 1.0% | 0.6% |

a) Historical

b) Forecast

prices are likely to keep Arizonans vacationing within the state. Leisure and hospitality is forecast to have employment gains of 2,900 in 2008 and 2,000 in 2009.

Federal and local government is forecast to add 4,000 jobs in 2008 and 2,600 in 2009. Most of the government growth is forecast to take place in local government, currently funded with voter-approved local sales taxes or bond issues. State government is not expected to add any jobs during the next two years as hiring freezes are observed.

ADOC, Research Administration expects that the construction industry will continue to struggle through 2008 and into 2009. However, job losses in 2009 are predicted to be much lower (-2.7 percent) as employment better matches the demand for housing, infrastructure

and new development.

The struggles in credit and housing markets are reflected in the expected losses in the financial activities industry. This sector includes finance and insurance and real estate and rental and leasing sectors, all affected by the problems in subprime lending and financial institutions. The forecast is for financial industries employment to decline by 2.9 percent in 2008 and 1.2 percent in 2009.

In conclusion, the Arizona economy is projected to experience small employment losses in 2008, primarily driven by the downturn in residential construction, a slower housing market and higher energy costs. Gradual economic improvements are forecast in 2009, taking into account lower interest rates, greater availability of credit, economic stimulus programs and a leveling of petroleum prices.

Arizona Employment Forecast

(In Thousands)

| | Historical | | | Forecast | |
|-----------------------------------------------|------------|--------|--------|----------|--------|
| | 2005 | 2006 | 2007 | 2008 | 2009 |
| Total Nonfarm Employment | 2508.8 | 2634.5 | 2666.0 | 2653.5 | 2656.8 |
| <i>Numerical Change</i> | 127.5 | 125.7 | 31.5 | -12.5 | 3.3 |
| <i>Percent Change</i> | 5.4% | 5.0% | 1.2% | -0.5% | 0.1% |
| Manufacturing | 182.3 | 185.7 | 181.7 | 177.9 | 176.3 |
| <i>Numerical Change</i> | 5.2 | 3.4 | -4.0 | -3.8 | -1.6 |
| <i>Percent Change</i> | 2.9% | 1.9% | -2.2% | -2.1% | -0.9% |
| Natural Resources & Mining | 8.6 | 9.9 | 11.3 | 13.2 | 14.3 |
| <i>Numerical Change</i> | 0.3 | 1.3 | 1.4 | 1.9 | 1.1 |
| <i>Percent Change</i> | 3.6% | 15.1% | 14.1% | 16.6% | 8.4% |
| Construction | 219.4 | 240.3 | 224.4 | 200.8 | 195.3 |
| <i>Numerical Change</i> | 27.7 | 20.9 | -15.9 | -23.6 | -5.5 |
| <i>Percent Change</i> | 14.4% | 9.5% | -6.6% | -10.5% | -2.7% |
| Trade, Transportation, & Utilities | 488.6 | 512.2 | 524.5 | 527.2 | 528.6 |
| <i>Numerical Change</i> | 25.9 | 23.6 | 12.3 | 2.7 | 1.5 |
| <i>Percent Change</i> | 5.6% | 4.8% | 2.4% | 0.5% | 0.3% |
| Information | 45.3 | 44.1 | 42.7 | 42.9 | 42.9 |
| <i>Numerical Change</i> | -1.6 | -1.2 | -1.4 | 0.2 | 0.0 |
| <i>Percent Change</i> | -3.4% | -2.6% | -3.2% | 0.5% | 0.0% |
| Financial Activities | 174.4 | 182.8 | 183.6 | 178.2 | 176.1 |
| <i>Numerical Change</i> | 9.7 | 8.4 | 0.8 | -5.4 | -2.1 |
| <i>Percent Change</i> | 5.9% | 4.8% | 0.4% | -2.9% | -1.2% |
| Professional & Business Services | 366.0 | 394.4 | 401.7 | 400.0 | 399.6 |
| <i>Numerical Change</i> | 27.3 | 28.4 | 7.3 | -1.7 | -0.4 |
| <i>Percent Change</i> | 8.1% | 7.8% | 1.9% | -0.4% | -0.1% |
| Education & Health Services | 275.7 | 291.6 | 303.7 | 315.4 | 321.5 |
| <i>Numerical Change</i> | 15.0 | 15.9 | 12.1 | 11.7 | 6.1 |
| <i>Percent Change</i> | 5.8% | 5.8% | 4.1% | 3.8% | 1.9% |
| Leisure & Hospitality | 254.3 | 266.7 | 272.7 | 275.6 | 277.6 |
| <i>Numerical Change</i> | 12.6 | 12.4 | 6.0 | 2.9 | 2.0 |
| <i>Percent Change</i> | 5.2% | 4.9% | 2.2% | 1.1% | 0.7% |
| Other Services | 91.4 | 98.2 | 97.0 | 95.5 | 95.1 |
| <i>Numerical Change</i> | 2.0 | 6.8 | -1.2 | -1.5 | -0.4 |
| <i>Percent Change</i> | 2.3% | 7.4% | -1.2% | -1.5% | -0.4% |
| Government | 402.9 | 408.5 | 422.7 | 426.8 | 429.4 |
| <i>Numerical Change</i> | 3.5 | 5.6 | 14.2 | 4.1 | 2.6 |
| <i>Percent Change</i> | 0.9% | 1.4% | 3.5% | 1.0% | 0.6% |

Note - All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

Source: Historical Data - Arizona Dept. of Commerce, Research Administration, in cooperation with U.S. Dept. of Labor, Bureau of Labor Statistics; Forecast Data - Arizona Dept. of Commerce, Research Administration, May 2008

Phoenix-Mesa-Scottsdale MSA Employment Forecast

(In Thousands)

| | Historical | | | Forecast | |
|-----------------------------------------------|------------|--------|--------|----------|--------|
| | 2005 | 2006 | 2007 | 2008 | 2009 |
| Total Nonfarm Employment | 1787.7 | 1884.1 | 1908.5 | 1899.2 | 1901.8 |
| <i>Numerical Change</i> | 104.0 | 96.4 | 24.4 | -9.3 | 2.6 |
| <i>Percent Change</i> | 6.2% | 5.4% | 1.3% | -0.5% | 0.1% |
| Manufacturing | 136.5 | 139.9 | 137.2 | 134.2 | 133.0 |
| <i>Numerical Change</i> | 4.6 | 3.4 | -2.7 | -3.0 | -1.2 |
| <i>Percent Change</i> | 3.5% | 2.5% | -1.9% | -2.2% | -0.9% |
| Natural Resources & Mining | 2.2 | 2.7 | 3.1 | 3.4 | 3.5 |
| <i>Numerical Change</i> | 0.1 | 0.5 | 0.4 | 0.3 | 0.2 |
| <i>Percent Change</i> | 4.8% | 22.7% | 14.8% | 9.0% | 5.0% |
| Construction | 163.9 | 180.1 | 168.7 | 150.8 | 146.5 |
| <i>Numerical Change</i> | 22.3 | 16.2 | -11.4 | -17.9 | -4.3 |
| <i>Percent Change</i> | 15.7% | 9.9% | -6.3% | -10.6% | -2.9% |
| Trade, Transportation, & Utilities | 362.1 | 379.5 | 388.8 | 390.8 | 392.0 |
| <i>Numerical Change</i> | 21.5 | 17.4 | 9.3 | 2.0 | 1.2 |
| <i>Percent Change</i> | 6.3% | 4.8% | 2.5% | 0.5% | 0.3% |
| Information | 33.3 | 32.4 | 31.3 | 31.6 | 31.8 |
| <i>Numerical Change</i> | -1.3 | -0.9 | -1.1 | 0.3 | 0.1 |
| <i>Percent Change</i> | -3.8% | -2.7% | -3.4% | 1.0% | 0.5% |
| Financial Activities | 147.0 | 153.4 | 153.6 | 149.4 | 147.9 |
| <i>Numerical Change</i> | 8.3 | 6.4 | 0.2 | -4.2 | -1.5 |
| <i>Percent Change</i> | 6.0% | 4.4% | 0.1% | -2.7% | -1.0% |
| Professional & Business Services | 296.8 | 319.2 | 324.2 | 322.9 | 322.6 |
| <i>Numerical Change</i> | 23.0 | 22.4 | 5.0 | -1.3 | -0.3 |
| <i>Percent Change</i> | 8.4% | 7.5% | 1.6% | -0.4% | -0.1% |
| Education & Health Services | 184.1 | 196.3 | 204.9 | 214.5 | 219.5 |
| <i>Numerical Change</i> | 10.5 | 12.2 | 8.6 | 9.6 | 5.0 |
| <i>Percent Change</i> | 6.0% | 6.6% | 4.4% | 4.7% | 2.3% |
| Leisure & Hospitality | 170.4 | 180.5 | 186.4 | 189.3 | 191.3 |
| <i>Numerical Change</i> | 8.5 | 10.1 | 5.9 | 2.9 | 2.0 |
| <i>Percent Change</i> | 5.3% | 5.9% | 3.3% | 1.6% | 1.0% |
| Other Services | 66.0 | 71.0 | 70.4 | 70.0 | 70.0 |
| <i>Numerical Change</i> | 1.8 | 5.0 | -0.6 | -0.4 | 0.0 |
| <i>Percent Change</i> | 2.8% | 7.6% | -0.8% | -0.5% | 0.0% |
| Government | 225.5 | 229.2 | 239.8 | 242.3 | 243.8 |
| <i>Numerical Change</i> | 4.7 | 3.7 | 10.6 | 2.5 | 1.6 |
| <i>Percent Change</i> | 2.1% | 1.6% | 4.6% | 1.0% | 0.6% |

Note - All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

Source: Historical Data - Arizona Dept. of Commerce, Research Administration, in cooperation with U.S. Dept. of Labor, Bureau of Labor Statistics; Forecast Data - Arizona Dept. of Commerce, Research Administration, May 2008

Tucson MSA Employment Forecast

(In Thousands)

| | Historical | | | Forecast | |
|-----------------------------------------------|------------|-------|--------|----------|-------|
| | 2005 | 2006 | 2007 | 2008 | 2009 |
| Total Nonfarm Employment | 366.7 | 379.6 | 383.1 | 377.4 | 376.2 |
| <i>Numerical Change</i> | 9.6 | 12.9 | 3.5 | -5.7 | -1.1 |
| <i>Percent Change</i> | 2.7% | 3.5% | 0.9% | -1.5% | -0.3% |
| Manufacturing | 28.3 | 28.1 | 27.5 | 26.9 | 26.6 |
| <i>Numerical Change</i> | -0.1 | -0.2 | -0.6 | -0.6 | -0.3 |
| <i>Percent Change</i> | -0.4% | -0.7% | -2.1% | -2.2% | -1.1% |
| Natural Resources & Mining | 1.4 | 1.6 | 1.8 | 2.1 | 2.3 |
| <i>Numerical Change</i> | 0.1 | 0.2 | 0.2 | 0.3 | 0.2 |
| <i>Percent Change</i> | 7.7% | 14.3% | 12.5% | 17.0% | 10.0% |
| Construction | 25.7 | 27.9 | 26.4 | 24.2 | 23.7 |
| <i>Numerical Change</i> | 1.7 | 2.2 | -1.5 | -2.2 | -0.5 |
| <i>Percent Change</i> | 7.1% | 8.6% | -5.4% | -8.4% | -1.9% |
| Trade, Transportation, & Utilities | 59.6 | 62.7 | 63.9 | 63.6 | 63.6 |
| <i>Numerical Change</i> | 1.7 | 3.1 | 1.2 | -0.3 | 0.0 |
| <i>Percent Change</i> | 2.9% | 5.2% | 1.9% | -0.5% | 0.0% |
| Information | 7.2 | 6.8 | 6.0 | 5.5 | 5.3 |
| <i>Numerical Change</i> | -0.4 | -0.4 | -0.8 | -0.5 | -0.2 |
| <i>Percent Change</i> | -5.3% | -5.6% | -11.8% | -8.0% | -4.0% |
| Financial Activities | 16.5 | 17.6 | 17.8 | 16.6 | 15.9 |
| <i>Numerical Change</i> | 0.6 | 1.1 | 0.2 | -1.2 | -0.7 |
| <i>Percent Change</i> | 3.8% | 6.7% | 1.1% | -7.0% | -4.0% |
| Professional & Business Services | 45.9 | 49.7 | 52.3 | 52.1 | 52.0 |
| <i>Numerical Change</i> | 2.5 | 3.8 | 2.6 | -0.2 | 0.0 |
| <i>Percent Change</i> | 5.8% | 8.3% | 5.2% | -0.4% | -0.1% |
| Education & Health Services | 50.5 | 52.6 | 54.2 | 54.6 | 55.0 |
| <i>Numerical Change</i> | 2.7 | 2.1 | 1.6 | 0.4 | 0.4 |
| <i>Percent Change</i> | 5.6% | 4.2% | 3.0% | 0.7% | 0.7% |
| Leisure & Hospitality | 39.8 | 40.6 | 39.8 | 39.2 | 39.2 |
| <i>Numerical Change</i> | 0.7 | 0.8 | -0.8 | -0.6 | 0.0 |
| <i>Percent Change</i> | 1.8% | 2.0% | -2.0% | -1.4% | 0.0% |
| Other Services | 14.7 | 15.8 | 15.5 | 14.6 | 14.3 |
| <i>Numerical Change</i> | 0.0 | 1.1 | -0.3 | -0.9 | -0.3 |
| <i>Percent Change</i> | 0.0% | 7.5% | -1.9% | -6.0% | -2.0% |
| Government | 77.1 | 76.3 | 77.9 | 78.1 | 78.3 |
| <i>Numerical Change</i> | 0.2 | -0.8 | 1.6 | 0.2 | 0.2 |
| <i>Percent Change</i> | 0.3% | -1.0% | 2.1% | 0.3% | 0.3% |

Note: All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

Source: Historical Data - Arizona Dept. of Commerce, Research Administration, in cooperation with U.S. Dept. of Labor, Bureau of Labor Statistics; Forecast Data - Arizona Dept. of Commerce, Research Administration, May 2008

Balance of State Employment Forecast

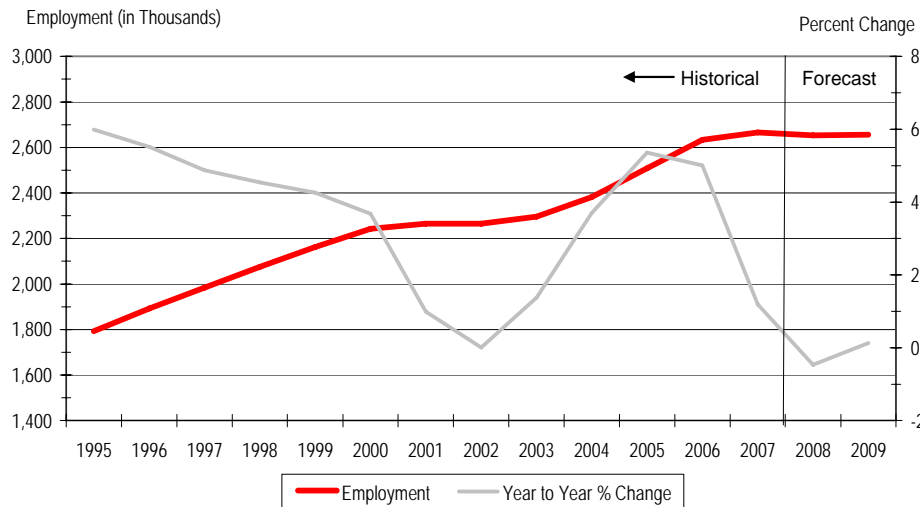
(In Thousands)

| | Historical | | | Forecast | |
|-----------------------------------------------|------------|-------|-------|----------|-------|
| | 2005 | 2006 | 2007 | 2008 | 2009 |
| Total Nonfarm Employment | 354.4 | 370.8 | 374.4 | 376.9 | 378.7 |
| <i>Numerical Change</i> | 13.9 | 16.4 | 3.6 | 2.5 | 1.8 |
| <i>Percent Change</i> | 4.1% | 4.6% | 1.0% | 0.7% | 0.5% |
| Manufacturing | 17.5 | 17.7 | 17.0 | 16.8 | 16.7 |
| <i>Numerical Change</i> | 0.7 | 0.2 | -0.7 | -0.2 | -0.1 |
| <i>Percent Change</i> | 4.2% | 1.1% | -4.0% | -1.1% | -0.5% |
| Natural Resources & Mining | 5.0 | 5.6 | 6.4 | 7.7 | 8.4 |
| <i>Numerical Change</i> | 0.1 | 0.6 | 0.8 | 1.3 | 0.7 |
| <i>Percent Change</i> | 2.0% | 12.0% | 14.3% | 20.1% | 9.5% |
| Construction | 29.8 | 32.3 | 29.3 | 25.8 | 25.1 |
| <i>Numerical Change</i> | 3.7 | 2.5 | -3.0 | -3.5 | -0.7 |
| <i>Percent Change</i> | 14.2% | 8.4% | -9.3% | -12.0% | -2.6% |
| Trade, Transportation, & Utilities | 66.9 | 70.0 | 71.8 | 72.8 | 73.1 |
| <i>Numerical Change</i> | 2.7 | 3.1 | 1.8 | 1.0 | 0.3 |
| <i>Percent Change</i> | 4.2% | 4.6% | 2.6% | 1.4% | 0.4% |
| Information | 4.8 | 4.9 | 5.4 | 5.8 | 5.9 |
| <i>Numerical Change</i> | 0.1 | 0.1 | 0.5 | 0.4 | 0.1 |
| <i>Percent Change</i> | 2.1% | 2.1% | 10.2% | 7.0% | 1.3% |
| Financial Activities | 10.9 | 11.8 | 12.2 | 12.3 | 12.3 |
| <i>Numerical Change</i> | 0.8 | 0.9 | 0.4 | 0.1 | 0.0 |
| <i>Percent Change</i> | 7.9% | 8.3% | 3.4% | 0.6% | 0.3% |
| Professional & Business Services | 23.3 | 25.5 | 25.2 | 25.0 | 25.0 |
| <i>Numerical Change</i> | 1.8 | 2.2 | -0.3 | -0.2 | 0.0 |
| <i>Percent Change</i> | 8.4% | 9.4% | -1.2% | -0.7% | -0.2% |
| Education & Health Services | 41.1 | 42.7 | 44.6 | 46.3 | 47.1 |
| <i>Numerical Change</i> | 1.8 | 1.6 | 1.9 | 1.7 | 0.7 |
| <i>Percent Change</i> | 4.6% | 3.9% | 4.4% | 3.9% | 1.6% |
| Leisure & Hospitality | 44.1 | 45.6 | 46.5 | 47.1 | 47.1 |
| <i>Numerical Change</i> | 3.4 | 1.5 | 0.9 | 0.6 | 0.1 |
| <i>Percent Change</i> | 8.4% | 3.4% | 2.0% | 1.3% | 0.1% |
| Other Services | 10.7 | 11.4 | 11.1 | 10.9 | 10.8 |
| <i>Numerical Change</i> | 0.2 | 0.7 | -0.3 | -0.2 | -0.1 |
| <i>Percent Change</i> | 2.1% | 6.1% | -2.6% | -1.6% | -0.8% |
| Government | 100.3 | 103.0 | 105.0 | 106.4 | 107.2 |
| <i>Numerical Change</i> | -1.4 | 2.7 | 2.0 | 1.4 | 0.8 |
| <i>Percent Change</i> | -1.4% | 2.7% | 1.9% | 1.3% | 0.8% |

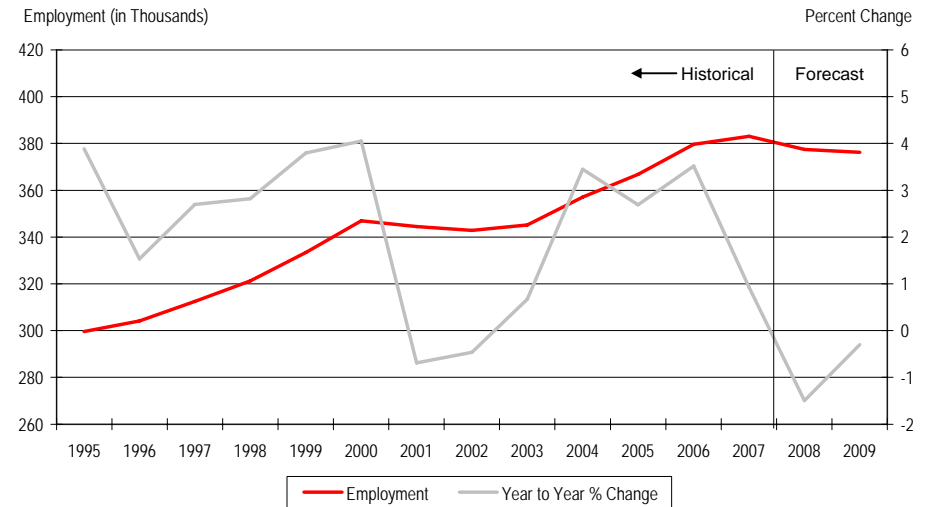
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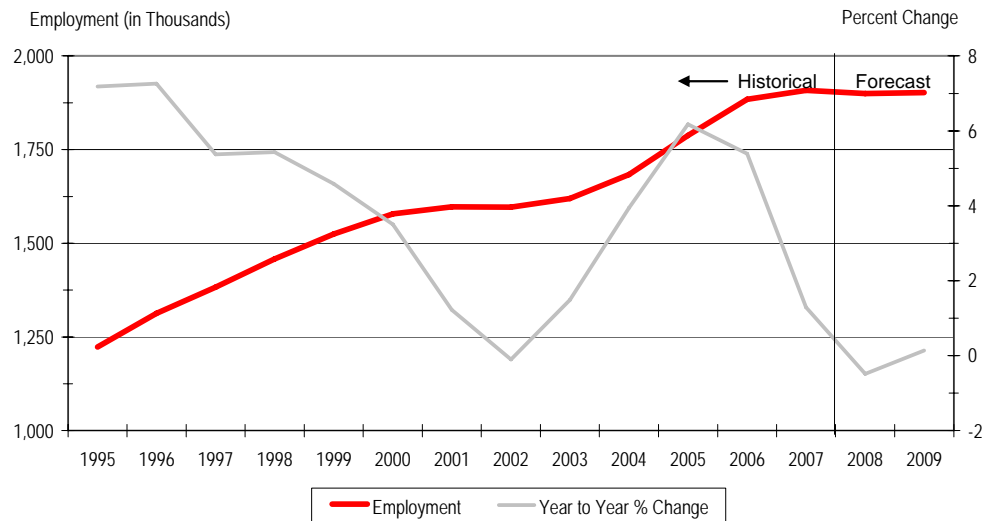
Arizona Nonfarm Employment



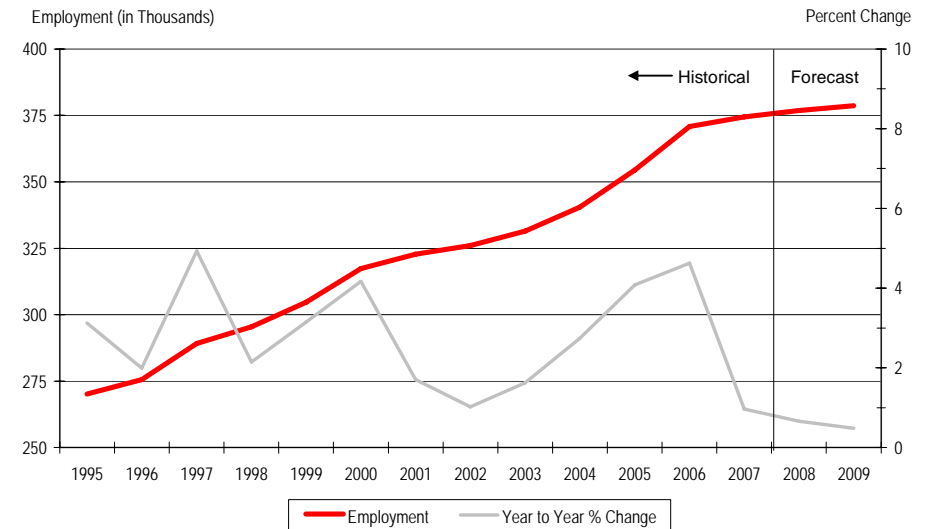
Tucson MSA Nonfarm Employment



Phoenix-Mesa-Scottsdale MSA Nonfarm Employment



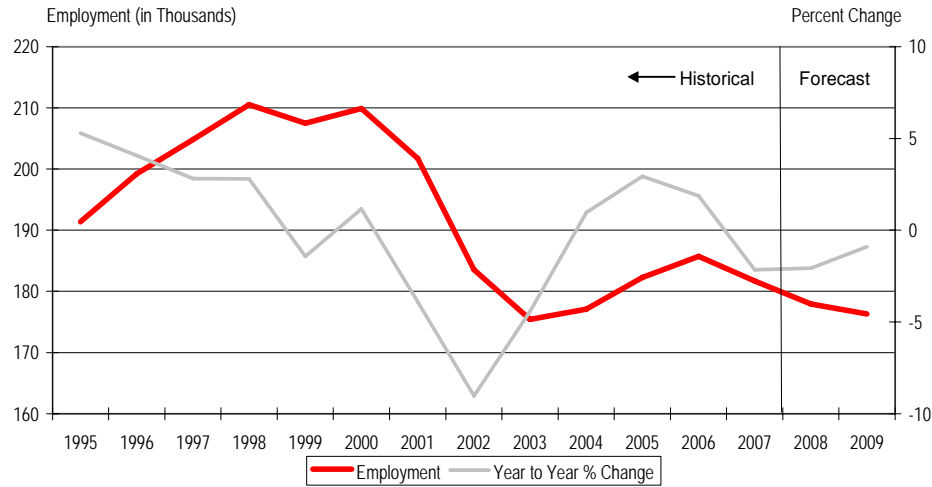
Balance of State Nonfarm Employment



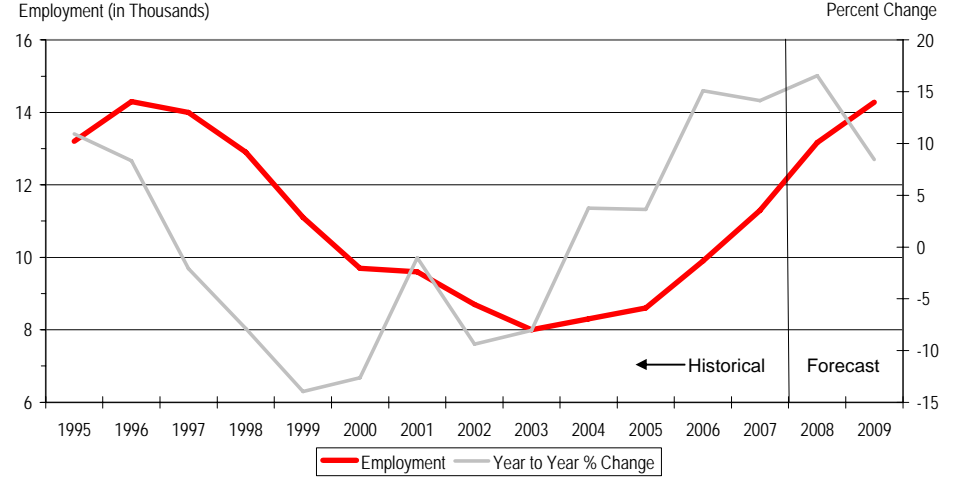
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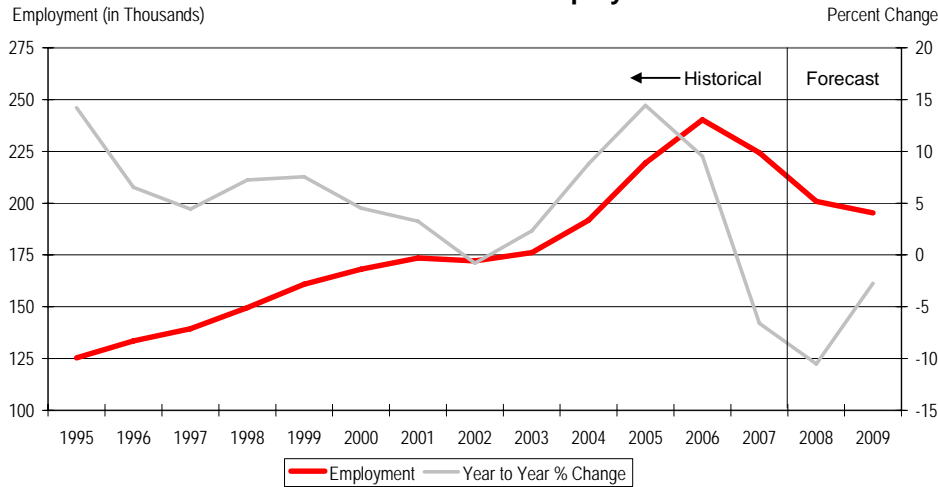
Arizona Manufacturing Employment



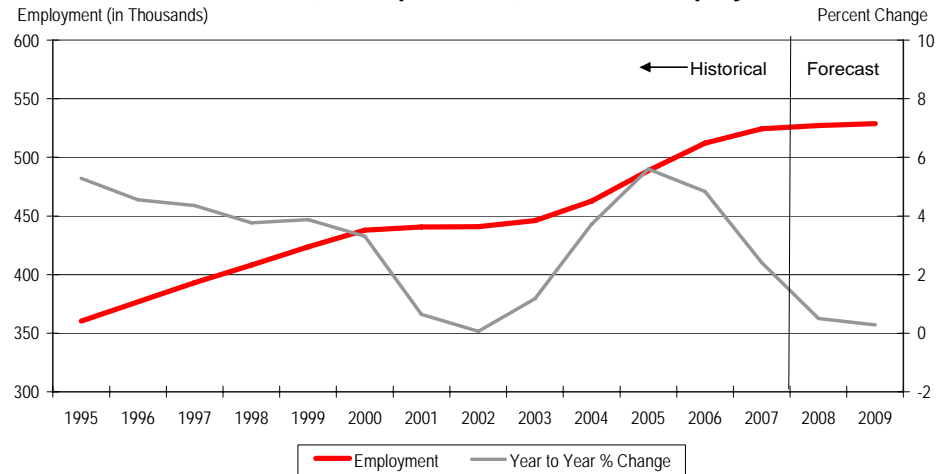
Arizona Natural Resources & Mining Employment



Arizona Construction Employment



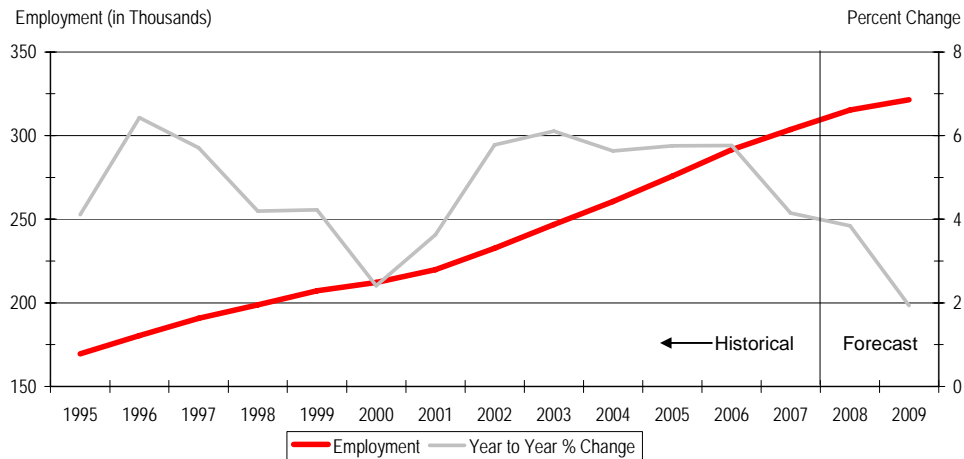
Arizona Trade, Transportation, & Utilities Employment



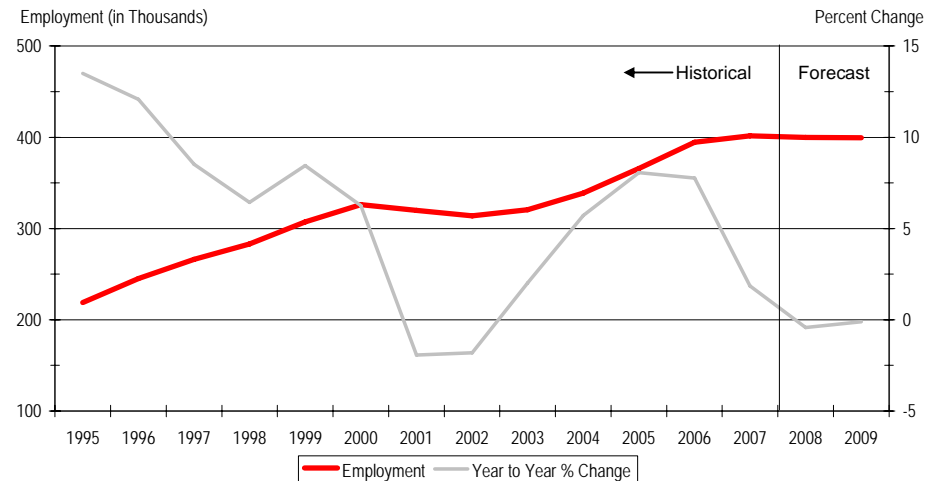
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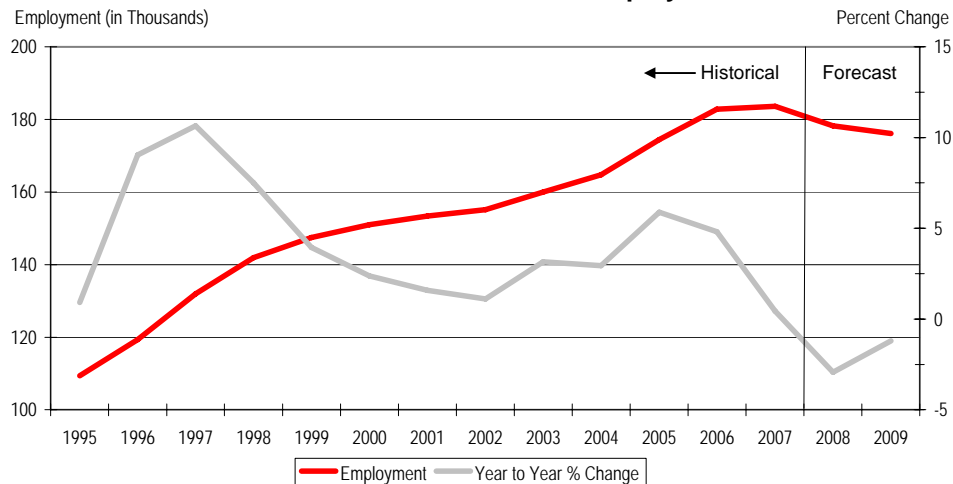
Arizona Education & Health Services Employment



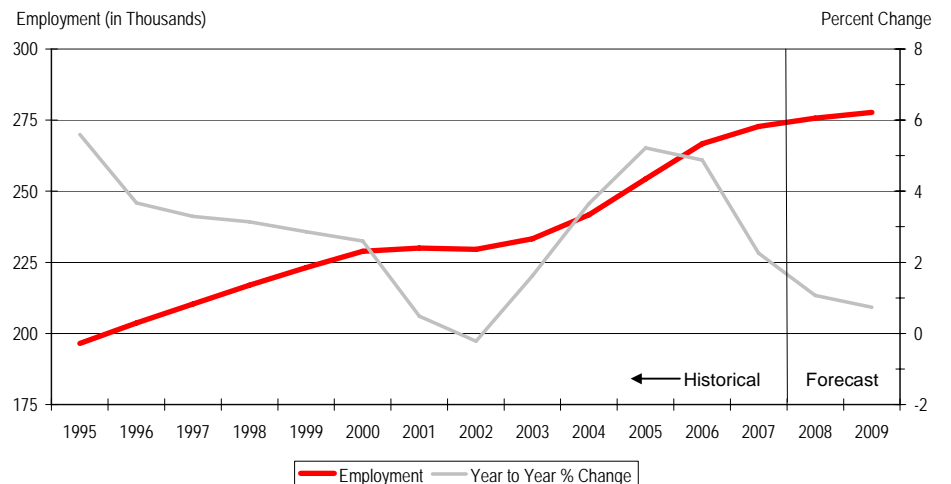
Arizona Professional & Business Services Employment



Arizona Financial Activities Employment



Arizona Leisure & Hospitality Employment



Note: All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

Source: Historical Data - Arizona Dept. of Commerce, Research Administration, in cooperation with U.S. Dept. of Labor, Bureau of Labor Statistics;
Forecast Data - Arizona Dept. of Commerce, Research Administration, May 2008



ARIZONA DEPARTMENT OF COMMERCE

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